



FUND CONTRIBUTION & FEE SCHEDULE

Donor Advised Fund

- Minimum contribution: \$5,000
- 1% of fund balance on an annual basis, calculated quarterly, charged directly to the fund

Agency Endowment Fund

- Minimum contribution: \$5,000
- 1% of fund balance on an annual basis, calculated quarterly, charged directly to the fund

Designated Agency Fund

- Minimum contribution: \$5,000
- 1% of fund balance on an annual basis, calculated quarterly, charged directly to the fund

Scholarship Fund

- Minimum contribution: \$20,000*
- 1.5% of fund balance on an annual basis, calculated quarterly, charged directly to the fund
- *Fund balance must reach \$20,000 prior to scholarship distribution

Green Leaf Fund

- Minimum contribution: \$1,000
- \$100 annual fee, assessed as \$25 per quarter, charged directly to the fund
- When the fund balance reaches \$5,000 the fund is converted to a Donor Advised Fund.

Pass Through Fund

- 3%, assessed to the fund balance, charged to the fund balance quarterly

Note: This fee schedule is reviewed annually by the Board of Trustees. It is subject to revision and update per Board approval. Fund holders will be notified of any revisions in writing at least one full quarter prior to any new fees going into effect.

The foundation support fee covers many benefits of working with the foundation including:

Investment management, fund holder communication and promotion, IRS and SC Sec. of State compliance, stewardship, grant making, collaboration with the nonprofit community, donor recognition and relationship management, acceptance and acknowledgement of charitable contributions, and other professional advisory roles as required. Thank you for your partnership and your support.